

*A Focus on People and Business . . .*

Attraction and Retention Series  
Issue 2

*Workforce Planning Toolkit*

*Resource Document 3.*

**SAMPLE PROJECT PLAN**

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## Attraction and Retention Series

### Issue 2 Workforce Planning

#### Resource Document 3

### SAMPLE PROJECT PLAN

Note: This plan is adapted from the Workforce Planning Project Plan developed by the Department of Mines and Energy (1999/2000).  
This sample plan is suggested as a guide only. It should be adapted for use in a manner that is applicable to the agency or work unit undertaking workforce planning.

Phase	Strategy	Actions to be Taken	Performance Measures	Action Officer	Timelines	Potential Problems/Delays
<b>PHASE 1</b>  <b>ESTABLISH PROJECT</b>	<i>Submit Project Plan for Approval</i>	<i>Gather workforce information:</i> <ul style="list-style-type: none"><li>➤ Obtain copies of agency and divisional strategic, corporate, and business plans, actions and priorities.</li><li>➤ Analyse plans and identify corporate workforce plan issues.</li><li>➤ Consult with appropriate stakeholders.</li></ul>	Strategic issues clearly identified and linked to proposed workforce management plan.	<i>(This column to note the name of the main officer/s responsible for carrying out the work involved in each section of the plan.)</i>	<i>(This column to contain a stated date by which each section of the plan should be completed.)</i>	<i>(This column to note any anticipated problems or delays that might occur. Identifying potential delays allow a contingency plan to be in place if need be. It also assists in setting a realistic timeline for each section of the Plan.)</i>

Phase	Strategy	Actions to be Taken	Performance Measures	Action Officer	Timelines	Potential Problems/Delays
		<b><i>Research Best Practice Workforce Management Plans:</i></b> <ul style="list-style-type: none"> <li>➤ Contact public and private sector organisations who have implemented best practice workforce management plans.</li> <li>➤ Arrange and attend meetings with relevant organisations.</li> <li>➤ Collect information on workforce plans, theories and models.</li> <li>➤ Analyse information and determine the most practical applicable models.</li> </ul>	Workforce management plan methodologies appropriate and practical for implementation in specific agency/situation are identified.			(example only : Officers from other agencies/organisations are unavailable for meetings causing delay in gathering the information.)
		<b><i>Develop and Submit Project Plan to Project Sponsors</i></b>	Project Plan adequately addresses workforce issues			
	<b>MILESTONE</b>	Project Plan approved and receives endorsement (DG/ Deputy DG/Executive Management Team, etc. as applicable)				
		<b><i>Establish a workforce planning implementation team:</i></b> <ul style="list-style-type: none"> <li>➤ Determine key divisions/regions and contact potential officers (or alternatively expressions of interest) who are deemed to have relevant skills, interest, availability, etc.</li> <li>➤ Members finalised and first meeting organised inviting project sponsors.</li> <li>➤ First meeting discusses and agrees on project objectives, goals, outcomes and roles and responsibilities.</li> </ul>	Project receives official endorsement and operational support from officers in agency work units.			

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<b>PHASE 2</b> <b>INVESTIGATE FUTURE NEEDS</b>	<i>Analyse and forecast the environment.</i>	<p><i>Factors which will influence future demand for outputs and/or services are identified.</i></p> <ul style="list-style-type: none"> <li>➤ Organisational planning documents, such as strategic and business plans are collected and analysed.</li> <li>➤ A scenario planning process is undertaken to identify possible future scenarios. (See readings on Scenario Planning for a full description of this process.)</li> </ul>	A scan of the external environment indicates possible future directions that the organisation may need to take.			
		<p><i>An analysis of scenarios identifies the workforce profile that will be required in the future.</i></p> <ul style="list-style-type: none"> <li>➤ Scenarios are analysed to identify the possible flow-on effects in terms of staffing, capabilities, technology, workforce practices, systems, budgets, etc.</li> <li>➤ Prepare a report on findings</li> </ul>	A workforce profile to fill possible future needs is identified.			
	<b>MILESTONE</b>	Report on findings of scenario planning and environmental scan completed.				
		<i>The environmental scan and forecasting are supplemented by information gained through the consultations held in Phase 4.</i>				
<b>PHASE 3</b> <b>DETERMINE CURRENT SITUATION</b>	<i>Gather and analyse census and trend information from relevant sources and prepare a report.</i>	<p><i>Collate and analyse information on workforce issues and the status of the agency identified through a variety of sources:</i></p> <ul style="list-style-type: none"> <li>➤ Gather data from MOHRI, HRIS, skills audits, client surveys, QPASS surveys, and any other data collections carried out by the agency.</li> <li>➤ Meet with relevant managers to discuss and establish human resources implications of the data for the agency.</li> <li>➤ Consult with Department of Industrial Relations to ascertain if any other initiatives could feed into this</li> </ul>	Census and trend data provide a picture of the organisation's current status.			

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		data collection. ➤ Benchmark the data against other agencies and/or the QPS as appropriate and possible. ➤ Prepare report on data for inclusion in Workforce Management Plan.				
	<b>MILESTONE</b>	Report on current state of the agency completed.				
<b>PHASE 4 CONSULT- ATION</b>	<i>Consult with appropriate stakeholders and prepare a report on findings.</i>	<i>Prepare a workforce planning questionnaire, distribute it and discuss findings:</i> ➤ Using outcomes from Phase 2 and information gathered through census and trend data as a guide, develop appropriate questions to assist in determining the key workforce issues for various divisions and work units. ➤ Forward questionnaire to senior officers for comment. ➤ Collate questionnaire information. (This can be done through Excel spreadsheet or the questionnaire could have been developed, distributed and collated electronically.) ➤ Organise follow-up meetings to discuss findings.	Relevant data gathered from key stakeholders.  Stakeholder “buy-in” achieved through involvement in the process.			
		<i>Establish client focus groups to discuss/gauge key workforce issues:</i> <i>(See section on consultation for running focus groups. Ensure that regional focus groups are held as the issues may be different and “buy-in” is essential.)</i> ➤ Focus groups held to discuss questionnaire findings and determine implications. ➤ Prepare and distribute a draft report to focus groups and obtain feedback. ➤ Prepare final focus group findings report.	Sufficient consideration of operational or regional requirements.  Workforce planning issues at the local level and some possible actions for the future are clearly identified.			
	<b>MILESTONE</b>	Submit report on results from research on current status of the organisation and results from stakeholder consultations				

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		to project sponsors and relevant senior officers for comment.				
<b>PHASE 5 GAP ANALYSIS</b>	<i>Complete Gap Analysis and Prepare Report.</i>	<p><b>Analyse data on status of the agency/work unit in relation to identified future requirements:</b></p> <ul style="list-style-type: none"> <li>➤ Identify gaps/deficiencies against benchmarks and desired future state of the agency/work unit.</li> <li>➤ Use workforce models and calculations as applicable.</li> <li>➤ Outline implications of deficiencies.</li> <li>➤ Prepare strategies to assist in reaching the desired state.</li> <li>➤ Prepare a report.</li> </ul>	<p>Sufficient consideration of client, staffing and public sector issues.</p> <p>Workforce planning issues at both strategic and operational levels and some possible actions for the future are clearly identified and articulated.</p>			
	<b>MILESTONE</b>	Report on gap analysis distributed to project sponsors.				
<b>PHASE 6 WORKFORCE PLAN DEVELOPED</b>	<i>Workforce Plan completed and endorsed by Director General (or most applicable senior officer)</i>	<p><b>Prepare draft workforce plan and submit to project sponsors for comment.</b></p> <ul style="list-style-type: none"> <li>➤ Collate analysis of the reports developed during the project.</li> <li>➤ Draft workforce plan outlining key finding, objectives and strategies.</li> <li>➤ Submit draft report to project sponsors for comment/revisions.</li> </ul>	Draft report adequately addresses, strategic, operational and public sector issues.			
		<p><b>Complete workforce plan and obtain senior level endorsement.</b></p> <ul style="list-style-type: none"> <li>➤ Make revisions based on feedback on draft document.</li> <li>➤ Submit through relevant senior officers to DDG and DG for endorsement.</li> </ul>	Invaluable planning document which identifies and aligns HR issues with strategic organisational outcomes.			
	<b>MILESTONE</b>	Workforce Plan receives endorsement.				

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<b>PHASE 7 IMPLEMENT STRATEGIES</b>	<i>Establish processes/structures to implement strategies.</i>	<p><b><i>Initiate and establish processes/structures to ensure that the strategies identified in the Workforce Plan are implemented.</i></b></p> <p><i>(How this is done will depend on the strategic level of the Plan, the strategies identified, and the officers or work units identified as being responsible for implementing them. The following is a guide only.)</i></p> <ul style="list-style-type: none"> <li>➤ Implementation Steering Committee formed.</li> <li>➤ Consideration is given to the organisational and cultural changes that may need to be addressed during implementation.</li> <li>➤ Steering Committee breaks strategies into meaningful “chunks” and priorities for action and delegates to responsible officers.</li> <li>➤ Steering Committee receives progress reports on individual strategies and monitors overall implementation.</li> </ul>	Strategies identified in Workforce Plan are implemented.			
	<b>MILESTONE</b>	Milestones set for individual strategies are reached on time.				
<b>PHASE 8 EVALUATION AND REVIEW</b>	<i>Evaluate and review the Workforce Plan.</i>	<p><b><i>Processes are in place for continual evaluation of the appropriateness of the strategies and review of the Workforce Plan.</i></b></p> <ul style="list-style-type: none"> <li>➤ The Implementation Steering Committee continually assesses the appropriateness of the strategies and their effect on the organisation.</li> <li>➤ A record is kept of informal feedback on the strategies.</li> </ul>	Strategies are implemented and evaluated.			

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		<p><b><i>A formal evaluation of the strategies is undertaken.</i></b></p> <ul style="list-style-type: none"> <li>➤ An evaluation tool is developed and distributed to gather information on the effect of the strategies.</li> <li>➤ Consultation is undertaken to gain feedback on the effectiveness of the strategies.</li> <li>➤ Results of the evaluation are used to make adjustments to the strategies if needed.</li> <li>➤ Results of the evaluation are used to inform the next Workforce Plan</li> </ul> <p><b><i>An evaluation of the workforce planning process is undertaken.</i></b></p> <ul style="list-style-type: none"> <li>➤ The project manager and steering committee evaluate the effectiveness and efficiency of the process that was used.</li> <li>➤ The project manager and steering committee evaluate the suitability and effectiveness of any tools or documents that were used in the process.</li> </ul>	Appropriate information is available to inform the next workforce planning cycle.			